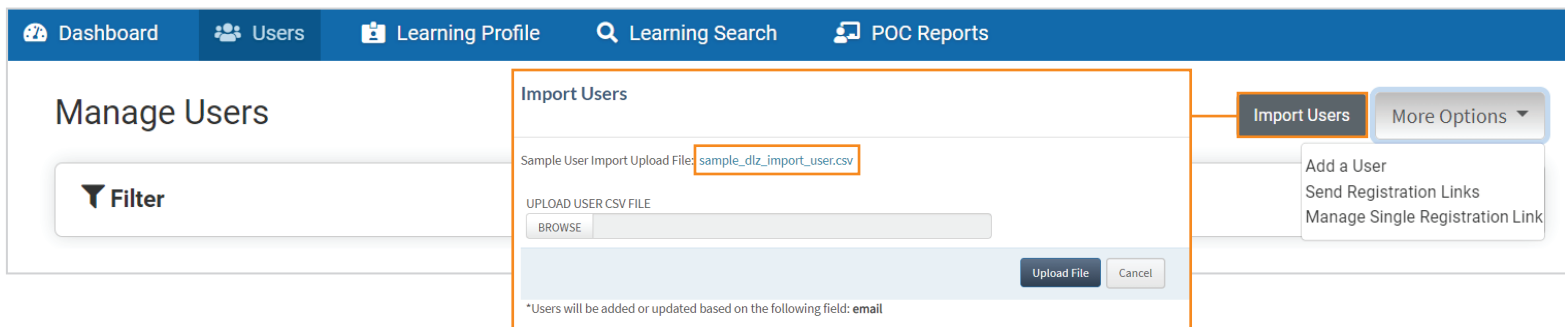


Importing User in Bulk

For Point of Contact Users (POCs) who need to add a large number of users, the **Import Users** function is a fast way to upload them all to the DLZ in a single action. The **Import Users** function is found on the **Manage Users** screen, under the tab **Import Users**.

- Download the sample template by clicking the link **Sample User Import Upload File**.
- Open the file and add your users by following the following formatting guidelines. Use the sample rows as examples (delete these before importing).



Filling Out the User CSV File

	A	B	C	D	E	F
1	email	is_poc	product_role	firstname	middlename	lastname
2	testuser1@deltek.com	no	Deltek Costpoint:Contracting Officer Billing Specialist	Test		User1
3	testuser2@deltek.com	no	Deltek Costpoint:Contracting Officer Billing Specialist;Deltek Vision:Business Developer	Test		User2

1 Column A: Email Required

Add user's email address. Must be a valid email format.

2 Column B: Is POC? Required

Mark as **Yes** or **No** to indicate whether this user will be a Point of Contact, which means an Admin level user. POC level users can enrol other users in courses, as well as add and delete other user records. If in doubt, put **No**. The current POC user can amend this status after import if required.

3 Column C: Product_Role Not Required


In this column add the name of your Deltek product and then the Role. The product names are prefixed with the word **Deltek** (i.e. Deltek Costpoint, Deltek, Vision, etc), and you should add a colon after the product name before adding the role you wish to assign to the user within the DLZ. The role names used within the DLZ are a pre-defined list, and you must choose roles from those used for your product within the system (you can see these by selecting your product in any search and the list of related roles will be displayed). To give a user more than one role, add the roles separated by the upright slash character.

- Do not add spaces around the special characters.
- If you are importing users who have access to DLZ learning for more than one Deltek Product, enter the product and role names separated by a semi colon (again, without spaces around the special characters).

Examples:

Deltek Costpoint:Contracting Officer|Billing Specialist.

Deltek Costpoint:Contracting Officer|Billing Specialist;Deltek Vision:Business Developer

 **Note:** The **Role** column is optional. You can successfully import users without specifying Products or Roles, and add these details manually per user after import. Additionally, each user can edit basic details of their own profile after their account is created, so you could ask your team to add their own roles at a later time.

Deltek Learning Zone

Data Formatting for Importing Users



Filling Out the User CSV File

	A	B	C	D	E	F
1	email	is_poc	product_role	firstname	middlename	lastname
2	testuser1@deltek.com	no	Deltek Costpoint:Contracting Officer Billing Specialist	Test		User1
3	testuser2@deltek.com	no	Deltek Costpoint:Contracting Officer Billing Specialist;Deltek Vision:Business Developer	Test		User2

- 4** Column D: First name Required
Add users first name. Cannot be blank, minimum length is one character.
- 5** Column E: Middle name Not Required
Optional, can be left blank.
- 6** Column F: Last name Required
Add users last name. Cannot be blank, minimum length is one character.

Uploading the CSV File

- 1** Once you are finished filling out the file, save it (retain in .csv format). Return to the DLZ and click **Browse** to find your file and then **Upload File** to preview it.

The uploaded data will be shown in preview mode on the screen before the import is final. Any cells that fail validation will be indicated, so that you can correct the issues and then try uploading the file again.

- 2** When there are no more validation errors, you will see the option of **Commit Users**. Clicking this button will upload the data. Once created, user accounts cannot be deleted, so check all user details are correct before committing to import. You will still be able to amend any details manually, but unwanted user accounts can only be marked as **Deactivated**.

Once imported, user details will be listed under the **Users option > Manage Users** page. If you imported users without assigning any product or roles, you can now select **Edit Users** and add products and roles to each user as required, by selecting them from a drop down list.

IMPORTANT NOTE:
If you encounter a timeout error during user import, wait a few minutes and check the users screen to confirm if the users have not been added. The process may take a few minutes depending on the size of the file. Do not re-upload.

Import Users

Sample User Import Upload File: [sample_dlz_import_user.csv](#)

UPLOAD USER CSV FILE

BROWSE

1 Upload File Cancel

*Users will be added or updated based on the following field: email

2 Commit Users

Please click 'commit' to proceed.

LINE	E-MAIL	IS POC?	PRODUCT_ROLE
1	testuser1@deltek.com	No	Deltek Costpoint:Contracting Officer Billing Specialist
2	testuser2@deltek.com	No	Deltek Costpoint:Contracting Officer Billing Specialist;Deltek Vision:Business Developer



Questions? Email us at DeltekUniversity@dlz.deltek.com.